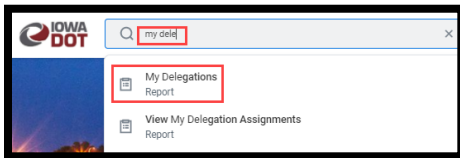


MANAGE DELEGATIONS

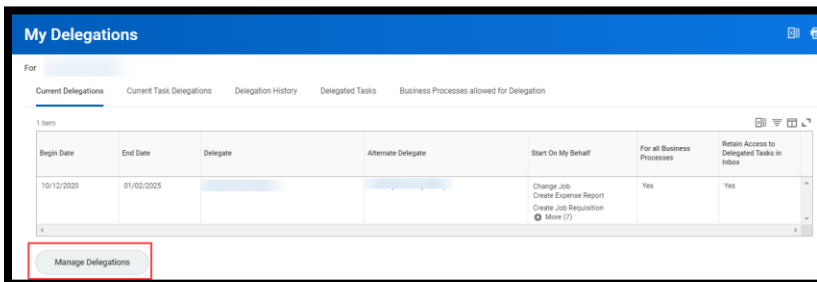
Security in Workday has changed. **Change Location** and **Change organization assignments** are now options only available to HR and Classification Partners in the Employee Services Bureau. If you are changing your delegates, you will need to make sure these two options are deselected for **all** delegates – even if you are not changing those delegates.

1. Type **my dele** in the **Search** bar



2. Select the **My Delegations** option

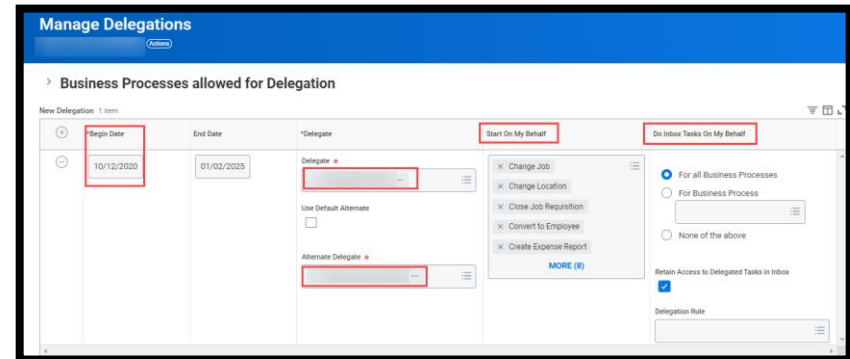
3. Click **Manage Delegations** to add or remove a delegate



4. Enter the **Begin Date** for the delegation



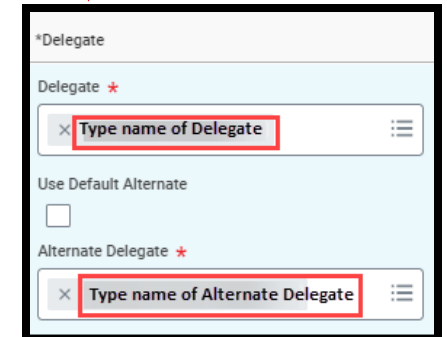
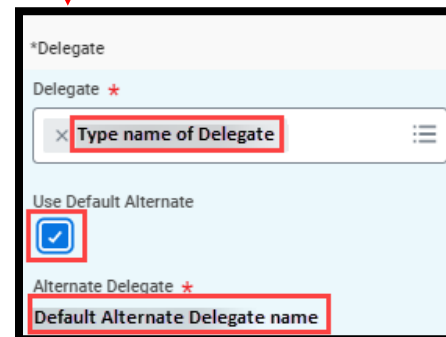
Note: An **End Date** is only required when you want the delegation to last for a specific time period, such as when you are on vacation.



5. In the **Delegate** search box, type in the name of the person to whom you are delegating your tasks



Note: An **Alternate Delegate** is required as the Delegate cannot approve his/her own time entry, time off requests, expenses, etc. If you have not yet selected an Alternate Delegate, you can leave the default name or uncheck the **Use Default Alternate** box and select your own Alternate Delegate.




6. Under the **Start On My Behalf** column, select tasks that you want your Delegate to be able to initiate. Leave blank if you do not want a delegate to initiate tasks



Note: Your options may vary as these are tied to your security.

7. Under **Do Inbox Tasks On My Behalf**, select one of three options:

- a. **For all Business Processes** – Your delegate will have all your Inbox tasks available to review, approve, deny, or send back. This option is best used on a temporary basis (e.g., you're on vacation)
- b. **For Business Process** – Click on the menu icon  in the **Search** box to select which business process(es) your delegate will be able to view and complete on your behalf. This option is best for tasks you want to permanently delegate

- c. **None of the above** – Select this option if you do not want your delegate to access your Inbox (i.e., you only want your delegate to initiate tasks on your behalf)

8. Check the **Retain Access to Delegated Tasks in Inbox** if you want to view and modify your Inbox while delegated



Note: Even if you retain access to your delegated tasks, if your delegate acts on an Inbox item first, the delegate retains ownership and the tasks will no longer be in your Inbox.

9. Click **Submit**. An alert will display: ***When you delegate the creation of an item, you give the delegate access to all of your previously created items of that type.***

10. Click **Submit** again

11. Click **Done**

RECOMMENDED DELEGATIONS**TIME & ABSENCE**

1. Start On My Behalf
 - a. **Enter Time** – Time off requests for yourself and workers (employees/subordinates)
 - b. **Correct Absence** – Time off request corrections for yourself and workers
 - c. **Enter Time My Time** – Enter/Submit your timesheet
 - d. **Enter Time for Worker** – Enter/Submit timesheets for workers
 - e. **Review Time** – Review/Approve timesheets for workers in mass outside of Inbox
2. Do Inbox Tasks on My Behalf (**Reviews, Approvals**)
 - a. **Request Time Off** – Approve submitted time off requests
 - b. **Correct Time Off** – Approve corrections to previously approved time off
 - c. **Enter Time Off** – Approve submitted timesheets
 - d. **Assign Work Schedule** – Approve work schedule change requests

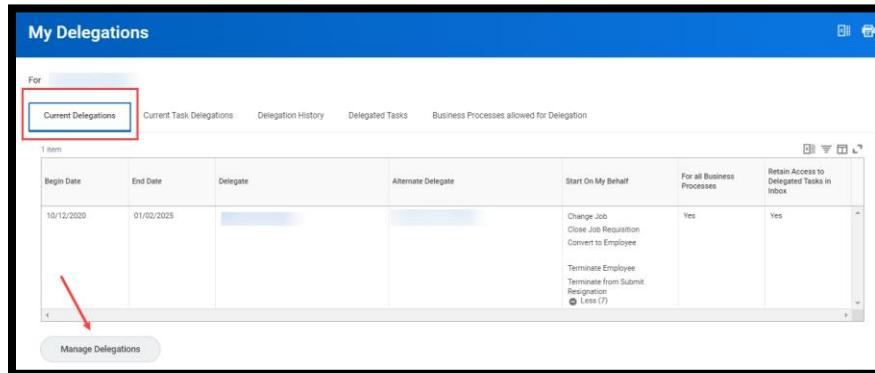
STAFFING

1. Start On My Behalf
 - a. **Change Job** – Promotions, Transfers, Demotions
 - b. **Hire Employee** – New employee hires
 - c. **Create Job Requisition** – Request to fill open position
 - d. **Edit Job Requisition** – Edit existing job requisitions
 - e. **Close Job Requisition** – Close uncompleted job requisitions
 - f. **Terminate Employee** – Retirement, terminations
 - g. **Setup Onboarding** – Onboarding process for new hires
2. Do Inbox Tasks on My Behalf (**Reviews, Approvals**)
 - a. **Change Job** – Promotions, Transfers, Demotions
 - b. **Hire** – New employee hires
 - c. **Job Requisition**
 - d. **Job Requisition Change**
 - e. **Close Job Requisition**
 - f. **Propose Compensation Change** – Within grade pay increases
 - g. **Propose Compensation Hire**
 - h. **Request Compensation Change** – Within grade pay increases
 - i. **Termination**
 - j. **Setup Onboarding**

NAVIGATING MY DELEGATIONS

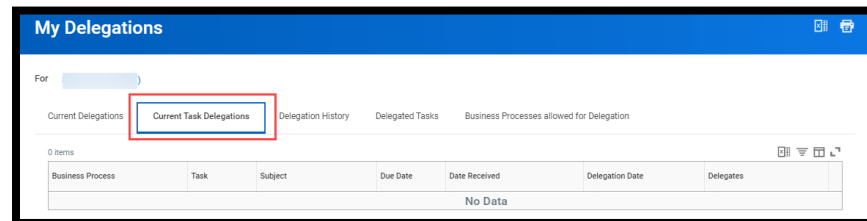
CURRENT DELEGATIONS

This tab allows you to see what you currently have delegated and manage any delegations you currently have (modify tasks, add or remove delegates)



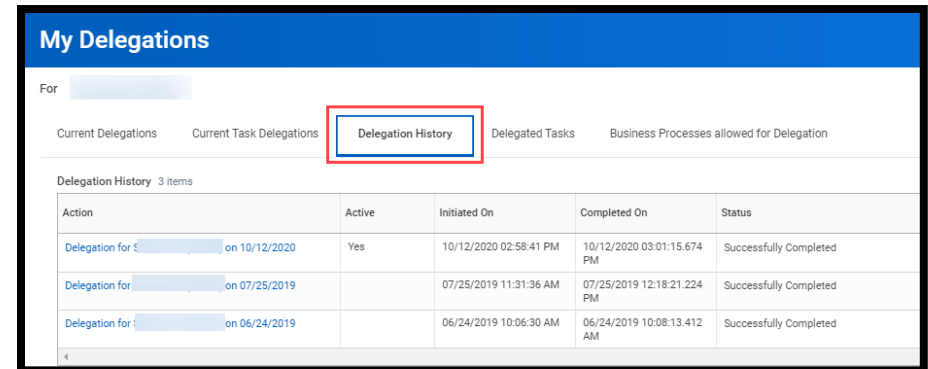
CURRENT TASK DELEGATIONS

This tab allows you to see what tasks (Inbox items) are awaiting action by or your delegate



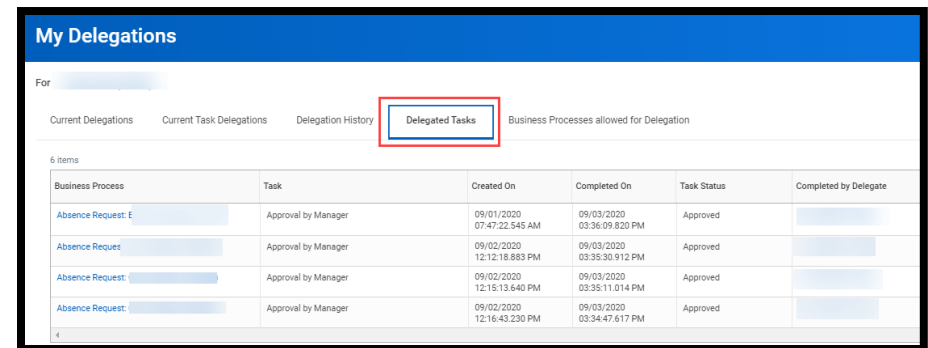
DELEGATION HISTORY

This tab allows you to see what delegations you set up in the past and what delegations are still active




DELEGATED TASKS

This tab shows what tasks were completed by your delegate



BUSINESS PROCESSES ALLOWED FOR DELEGATION

This tab shows the list of business processes you can delegate.

 **Note:** Your options may vary as these are tied to your security.

My Delegations

For

Current Delegations

Current Task Delegations

Delegation History

Delegated Tasks

Business Processes allowed for Delegation

Business Processes allowed for Delegation

245 items

Business Process Type	Inbox Actions	Start Business Processes
Absence Calendar	Yes	Correct Absence Enter Absence
Accounting Adjustment Event	Yes	
Accounting Journal Event	Yes	
Accounting Journal Unpost-Reverse Event	Yes	